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DSSD CENSUS 2000 PROCEDURES AND OPERATIONS MEMORANDUM SERIES  
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MEMORANDUM FOR Michael Longini  
Chief, Decennial Systems and Contract Management Office

Attention: Ed Wagner  
Decennial Systems and Contract Management Office

From: Howard Hogan *Howard Hogan*  
Chief, Decennial Statistical Studies Division

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Decennial Statistical Studies Division

Subject: Observation of Coverage Edit Followup at TCIM - Longview, TX

**I. Introduction**

I traveled to Longview, TX on May 20 and 21 to observe the Coverage Edit Followup (CEFU) operation. This is one of thirteen call center locations throughout the country conducting CEFU for Census 2000. The purpose of the trip was to observe agents (telephone interviewers) conducting Computer Assisted Telephone Interviews (CATI) for the CEFU operation. I also observed the methods Quality Assurance (QA) agents use to monitor the performance of CEFU agents and how they provide feedback to the agents.

**II. Observations and Comments**

**A. Tour of Facilities**

On Saturday, May 20, I arrived at the TCIM facility in late afternoon and was given a tour of the call center by the QA supervisor on duty. I was introduced to several of the supervisors and managers associated with the CEFU operation. I was shown the "call floor" as well as the QA office where agents are monitored.

The area where the agents were seated was roped off to keep employees from other projects away from the CEFU staff. This was done to prevent non-sworn employees from other call center operations from seeing or overhearing Title 13 information contained within the CEFU interviews. It seemed effective. I did not see anyone who did not belong entering the roped off area.

## B. Quality Assurance

After my tour of TCIM, I was taken to the QA monitoring area and introduced to the QA staff. The QA room was isolated from the agents to ensure monitoring was unbiased and thorough. The QA agents and their supervisors were the only individuals allowed in QA monitoring room. After a brief description of the QA procedures, I was shown some of the reports and forms that are used by the QA supervisors.

I was not able to observe a calibration session during my visit, but I was given an explanation of how they are done. Calibration sessions are conducted regularly to ensure each of the call centers are using the same standards to evaluate the agent's work. In a calibration session, QA supervisors from all the call centers listen to and evaluate the same call and then compare their evaluation scores of the call.

I was able to observe QA agents conduct their work. After an agent completed a call, the QA agent rated the quality of the resolution based on several call attributes and assigned the agent a score for the resolution. Once the score was determined, the QA agent proceeded to the "call floor" and provided immediate feedback on the previous resolution to the agent. The positives of the resolution were emphasized while the QA agent reminded the agent to adhere to the call guidelines.

## C. Call monitoring

I spent the majority of my time at the call center monitoring interviews. I was given instructions on how to both listen to the interview as well as to view the same screens as the agent was viewing during the call. I listened to a variety of agents throughout the three shifts in which I was present.

Each agent's computer was logged into the system to handle a specific edit failure type. Most agents I observed were conducting interviews for short form count discrepancy cases. A few of the stronger agents were conducting interviews for short form large household cases. No one was conducting any long form interviews since at that time, the long form version of the CEFU instrument was still being tested.

Calls were made and connected to each active agent's computer using a predictive dialer. At times, I observed active agents waiting as long as five minutes for a new call to be directed to them. I was told that due to the dialer settings, when only a few agents are active, the wait times for an agent to be delivered a call are longer than when a greater number of agents are active. The dialer is set this way

to ensure that respondents will not be contacted when an agent is not available to take their call.

This call center was experiencing a problem with their dialer during my visit. Occasionally, an agent's computer would lock up while the agents were waiting for a call. This forced the agent to exit out of the program and login to the system again. The technical staff at the call center was aware of the problem and was working with the technical supervisors at EDS to resolve this problem. This problem did not seem to occur very often and while it frustrated the agents, I do not think performance was too adversely affected.

In general, I was satisfied with the agents performance. Most agents stayed fairly close to the required verbatim reading of the scripts in the interview instrument. They usually only deviated from the scripting when confronted with a reluctant respondent or a respondent who was obviously confused by the scripting.

Most of the agents demonstrated effective "soft skills". These skills include active listening, the use of appropriate probing follow up questions, maintaining neutrality, practicing acceptable telephone courtesy and appropriate speaking skills. They contacted a supervisor when one was requested by the respondent or if they encountered a unique situation which the agent was unsure how to handle.

Many times the respondent was less than enthusiastic in responding to our probes and data collection questions. Often, the respondents commented on the repetitive nature of our probes and/or the length of the interview. Usually, the agent had the ability to convince the respondent to complete the interview in spite of its length and repetitiveness. The effective use of these soft skills allowed most agents to complete most calls with reluctant respondents.

Since I had presented myself as one of the designers of the CEFU instrument, I received many questions from the floor supervisors and their agents. Many of the questions were excellent. They pointed out several scenarios that they were being presented with during interviews that were not covered in the training. Other questions indicated that common sense conflicted with their training. It became clear that there were several scenarios occurring that we had not designed the instrument to handle.

I did not respond directly to their questions, but I did pass along several of them to the contract's management staff in the Decennial Systems and Contract Management Office. They included:

- \* How to handle a case when all of the eligible respondents were deceased or had moved away.

- \* Whether to delete extra check boxes, indicating unnamed residents, at the end of the interview.
- \* How to apply residence rules when a child is in a 50/50 custody agreement and the respondent does not know whether the child was with them on April 1, 2000.
- \* How to apply residence rules when a resident was released from jail on April 1, 2000.

For all of these issues, I suggested the supervisor get in touch with their contact at EDS, the primary contractor for this operation. Additionally, some of these questions, as well as those raised during the call center observations of other headquarters employees, led to the issuing of agent instruction sheets to clarify some confusing situations.

I was told that this location had 65 seats dedicated to our operation, but I never saw anywhere near that many agents working at one time. There were less than twenty agents working during the afternoon shift on Saturday and half that many working Saturday night and Sunday morning. I was told that the call center had recruited over 120 agents, but that fewer than half remained due to the month long delay in the start of this operation. Also, I was told they had more difficulty meeting their staffing on weekends than on weekdays.

### **III. Conclusion**

My visit to this call center was very helpful for me to better understand how many of the decisions we made in planning the CEFU instrument have affected the success of the operation. In general, I was very impressed with the quality of interviews and dedication of the agents I observed. This observation gave me valuable insight into the difficulties faced by the agents as they administered the CEFU interview.

My only major concerns were related to the low staffing levels and the long wait agents had to receive a new call. I assumed that the call centers would be making more substantial attempts to fill all the seats they had dedicated to our operation, especially on the weekends when the Bureau anticipated having our best success contacting respondents. Also, the wait time between calls seemed to be excessively long. Maybe the dialer setting should be changed to deliver calls faster to the agents.

Since our operation has a fixed end date, I fear the low staffing levels and excessive time between calls may prevent some call centers from completing all their cases before the end of the operation.

Attachment

cc: DSSD Census 2000 Procedures and Operations Memorandum Series Distribution List  
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# **OUTBOUND INBOUND TQA GENERAL PRODUCTION CHECKLIST OF CENTER ACCOUNTABILITIES AND PERFORMANCE MEASUREMENTS**

**CENTER:** TCIM Longview, TX

**DATE:** May 20-21, 2000

**OBSERVER:** Dave Sheppard

Center Accountabilities/ Performance Standard	Meets Standard	Does Not Meet Standard	Comments
Auto Focus Scan Forms are always completed by QA Reps when monitoring agents.	Yes		
Agents and their supervisors are consistently given feedback by QA Reps after monitoring sessions.	Yes		
Calibrations sessions are held by QAR Supervisors for all QA Reps.			Did not observe activity
Agents use OSS to enter data for form requests.			N/A
Agents use OSS to complete survey forms.	Yes		
Agents use OSS to answer caller questions.	Yes		
Bi-lingual agents are proficient in English as well as the 2 <sup>nd</sup> language.			N/A
Agents and other staff that have access to Title 13 data are all sworn in.			Did not observe activity

Center/Accountabilities/ Performance Standard	Meets Standard	Does Not Meet Standard	Comments
Supervisors are observed to be actively assisting agents, conducting at-station call observations, answering questions and handling escalated calls when necessary.	Yes		
EDS monitoring spreadsheet is used for QA monitoring schedules, tracking performance scores, agent classifications and agent status reporting.		?	There were folders for each agent with their QA sheets, but I wasn't shown any summary sheets that tracked an agent's work.
Center management is knowledgeable about TQA requirements and facilitates observer.	Yes		